



Central Puget Sound Regional Fare Coordination System

Agency Website – Instructor Guide

Document No: SEA-02703

Category: Phase 2

Revision: 8.0

Publisher: ERG Transit Systems

Revision Date: Nov 17, 2010

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1 Introduction

This training describes how authorized Agency employees can carry out inventory management and card procurement functions through the Agency website within the Regional Fare Coordination System (RFCS).

The RFCS websites are accessible through a link provided to participating Agencies. These websites are not shared with any parties outside of the RFCS and do not contain information or references to non-RFCS Agencies.

ERG Transit Systems (USA), Inc. (ERG), through the ERG Service Bureau (ESB), hosts and maintains the RFCS websites and provides support services for the websites.

Access to the Agency website is through a username and password, and certain functions are restricted to users based on their access privileges. This class should be taught in Training Mode to avoid negative financial impacts on the live system. Username/password accounts that have the Training Mode setting activated must be created for any and all of the various roles that a particular Agency might be training on Agency Website use.

This document addresses the following:

- Learning objectives for the ORCA Agency Website training module
- Key points and recommended order for the presentation of the relevant topics
- References to the appropriate training aids and documentation by topic
- Attendance list to record the names of the module participants
- Answers to the practice exercises
- A copy of the module evaluation form, which is also contained in the student workbook issued to each participant

1.1 Purpose and Scope

The document was developed as a guide for instructors delivering training on the on-board equipment. This document is meant to be used concurrently with the following:

- [1] SEA-00365 RFCS Agency Website Operations Manual
- [2] SEA-02855 RFCS Agency Website Operations – Presentation
- [3] SEA-02704 RFCS Agency Website Operations – Student Workbook
- [4] SEA-02705 RFCS Agency Website Operations – Quick Reference
- [5] SEA-00056 Training Program Plan (CDRL 28)

The main content of this Instructor Guide is presented within a table, as described in Table 1.

Table 1: Instructor Guide Conventions

Column	Convention
Topic	Topic Number

Column	Convention
Key Learning Points	This column provides key learning points, notes, warnings, and suggested methods of presentation of the topic. Items in Dark Red\Bold text will identify the learning outcomes (objectives) that are being addressed in the particular section. Items in <i>Green\Italics</i> are the items to be covered, and the standard text provides prompts for the instructor. These prompts are usually summarized from the sections noted in the reference column.
Actions	This column provides the instructor with a prompt regarding the relevant training aid to use. This may be to demonstrate a task, to show a particular OHP slide, or to play a multimedia piece on a LCD projector. These actions are shown in <i>Green\Italics</i>.
Reference	This column provides a reference to the relevant supporting documentation.

1.2 Instructor Plan

The following instructor plan is excerpted and adapted from SEA-00056 Training Program Plan (CDRL 28) v12.0 [5]. It constitutes a summary of the module's objectives and the materials necessary to conduct the training.

Module Title	ORCA Agency Website
Description	Operating the Agency website for RFCS Agency business functions and procedures.
Target Group	Customer Service Representatives, Marketing Service Representatives, Lead Agency Representatives, Customer Service Supervisors
Class Size	Maximum recommended - 12
Prerequisites	• Basic computer literacy including use of Internet and Microsoft Windows applications • Basic Training Skills for Train-the-Trainer students
Delivery Method	Instructor-led training with practice exercises
Objectives	Trainees will demonstrate the ability to: • View customer, smart card transaction history • Review work orders • View rebate history • Upload new rebate files • Order card stock • Block smart cards • Search the knowledge base • Create, approve, and review card stock orders • Accept / reject card stock orders

	• Distribute cards to sub-locations • Order disposable card stock • Order loaded disposable cards for distribution • View inventory status • Fulfill card stock orders • Update card status • Generate card status reports • Use Knowledge Base to find information about ORCA cards and system, regional, and Agency-specific customer service procedures and policies
Duration	6 hours
Venue	Agency training room with access to Agency website
Training Equipment & Setup	• LCD projector • PC with access to the Agency, Call Center, Cardholder, and Business Accounts websites for each trainee • PC with access to the Agency, Call Center, Cardholder, and Business Accounts websites for the instructor • Training card serial numbers for creating cardstock orders • Sample inventory data
Training Material	• PowerPoint presentation: • Copies of the Instructor Guide for the instructor, • Copies of the Operations Manual and Student Workbook for each of the trainees • Quick Reference Guides
Assessment	Performance on final competency assessment exercises
References	• SEA-00365 RFCS Agency Website Operations Manual [1] • SEA-02855 RFCS Agency Website Operations – Presentation [2] • SEA-02704 RFCS Agency Website Operations – Student Workbook [3] • SEA-02705 RFCS Agency Website Operations – Quick Reference [4] • SEA-02703 Agency Website Operations - Instructor Guide

Table 2: Module Details

Item	Description
Course Title	Customer Service
Module	ORCA Agency Website
Duration	6.0 Hours

Item	Description
Venue	Agency training room with access to Agency website
Target Audience	Customer Service Representatives, Marketing Service Representatives, Lead Agency Representatives, Customer Service Supervisors
Prerequisites	- Basic computer literacy including use of Internet and Microsoft Windows applications - Basic Training Skills
Preparation by Instructor prior to class (printed handouts of this information is recommended)	- Create 2 cardstock orders for each student and move it to a Shipped status (record the numbers and provide them to the students for Exercise 2F and Assessment 4 - Examine the range of Inventory available in Training Mode for your location. Select a single card # and a range of card #'s and to provide for Exercise 2G - Examine Training in your location and select an Existing Work Order to provide for Exercise 3B - Examine Training in your location and select a Card # with a Transaction History to provide for Exercise 3C and Assessment 6 - If you are teaching KCM Supervisors, obtain an ACCESS file to provide for Exercise 3F - If you are teaching WSF Supervisors, obtain a WSF Rebate file to provide for Exercise 6B - If you are teaching Supervisors, Examine Training Inventory from your location and select a Card # with Product attached to provide each Supervisor student to Block Product for Exercise 3D - If you are teaching Supervisors, Examine Training Inventory from your location and select a Range of Card #'s to provide each Supervisor student to Block for Exercise 3E - If you are teaching Authorized users, create an NSF entry and provide that customer # for Exercise 4A and Assessment 5 - If you are teaching Supervisors, Examine Training Inventory from your location and select (or create) a Customer # to provide to add an NSF event for Exercise 4B - If you are teaching Supervisors, Examine Training Inventory from your location and select (or create) a Customer # to provide to add a Bad Check Entry for Exercise 4D - If you are teaching Supervisors, Examine Training Inventory from your location and select a Corporate Check/PO Entry for each student to provide for Exercise 4F

Item	Description
	• If you are teaching Authorized KCM users, Examine Training from your location and select or create Existing Vanpools for each student to provide for Exercise 5B • Examine the Training Knowledge Base and select (or create) items to provide students when searching in Exercise 7A and Assessment 9

1.3 Attendance Form

Module Title RFCS Agency Website Operations **Module Number/Code** AGENCY-
WEB

Module Duration **From:** **To:**
Module Venue **Name of**
Instructor/Facilitator

	Participant Name	Job Role	Department
1			
2			
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2 Instructor Notes

This document is intended to be used concurrently with the training presentation SEA-02855 RFCS Agency Website Operations – Presentation [2]. The training presentation is a visual aid to accompany a concurrent lecture and demonstration of the Agency website. The trainers should familiarize themselves with SEA-02855 RFCS Agency Website Operations – Presentation [2], this instructor's guide, the Agency website, and SEA-00365 RFCS Agency Website Operations Manual [1] to prepare for sessions with trainees. Trainers should verify the Roles required for attending trainees and have appropriate username/password accounts for the required Roles created ahead of time with the Training Mode setting activated. This includes access to the Knowledge Base. Trainer should also have cards prepared for the exercises and have a range of card serial numbers to use. Examples of uploadable ACCESS and WSF Rebate files should be obtained from the originating Agency.

2.1 Overview

2.1.1 Module Introduction

Topic	Key Learning Points	Actions	Reference
1.	<i>Introduce yourself and welcome participants to the Agency Website Operations Training.</i> <i>Ask participants to introduce themselves and provide you a brief description of what they want to gain from this module.</i> <i>Provide any relevant information on the venue, such as restrooms, phones, etc.</i> <i>Provide information on module timetable such as start/end time, breaks, etc.</i> <i>Invite questions from the participants at any time during the module.</i>	<i>Show Slide #4 Agency Website Operations Training</i>	SEA-02855 RFCS Agency Website Operations – Presentation
2.	<i>Explain the purpose of this module and what will be covered.</i> <i>This module will just cover the training of Agency Website use. This module forms part of the RFCS Training course. An introduction to the Regional Fare Coordination System (RFCS) is offered in the RFCS High Level System Overview course, which should be attended prior to this module. Not all aspects of this training will be relevant to all class attendees, because the Agency Website is used by a variety of Roles.</i> <i>Additional modules are offered on use of other</i>	<i>Direct Students to turn to Contents page in SEA-00365 RFCS Agency Website Operations Manual and Appendixes A, B, C, D, E, F, G, and H</i>	SEA-00365 RFCS Agency Website Operations Manual: Contents, Appendixes A, B, C, D, E, F, G, and H

Topic	Key Learning Points	Actions	Reference
	<i>RFCS devices and administrative processes. Participants should check with their supervisors to determine which additional relevant modules to attend.</i> <i>Review the module agenda:</i> • <i>Overview</i> • <i>Login and Logout</i> • <i>Card Orders and Inventory Management</i> • <i>Customer Support and Card Services</i> • <i>Finance</i> • <i>Vanpools</i> • <i>WSF Rebates</i> • <i>Knowledge Base</i> • <i>Reports</i> <i>Mention Appendix A (Terminology) lists Acronyms, Abbreviations, Terms and Definitions; Appendix B (Access Control Roles) lists the various types of access and attending functions; Appendix C (Supervisor Functions Cross-reference) helps locate specific functions within sections; Appendix D (Troubleshooting) has basic procedures for Website/Connectivity issues, Appendix E (Error Conditions) has a table of system generated messages; Appendix F (Lists of Tables and Figures) and Appendixes G, and H contain general information about the Ops Manual document.</i>		

2.1.2 Student Workbook and Module Training Aids

Topic	Key Learning Points	Actions	Reference
3.	<i>Explain the format of the Student Workbook:</i> • Introduction • Practice exercises • Student assessment exercises • Module evaluation form • Notes	<i>Direct Students to turn to Student Workbook Section in SEA-00365 RFCS Agency Website Operations Manual</i>	SEA-02704 Agency Website - Student Workbook

2.1.3 RFCS Agency Website Overview

Topic	Key Learning Points	Actions	Reference
4.	<i>Present the users with an overview of the Agency website functionality:</i> - Provides limited support for Agency personnel at Walk-In Centers - Used by RIDC and to fulfill cardstock orders - Used by mail Center to place Cardstock Orders - Used by ESB to fulfill operator card orders - Used by Financial personnel to order and manage cardstock inventory	<i>Direct Students to turn to Section 1 and subsection 1.1 Overview</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 1 and subsection 1.1
5.	<i>Explain that access to the Agency website functions is determined by user access roles:</i> - Users can be assigned multiple roles. - The assignment of roles is at the discretion of individual Agencies. - When a user does not have access to a function, it does not appear on the website. - Briefly describe the centers that use the Agency website	<i>Direct Students to turn to Appendix C User Access Roles, Section 1.2 User Access Roles and 1.3 RFCS and Agency Centers</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 1.2 and 1.3
6.	<i>Explain that the Agency website can be operated in Training mode.</i> - Allows a user to perform limited activities in a controlled environment. - When in Training mode, the website clearly displays Training Mode. - User can modify, add and delete information in cardstock orders, leaving inventory unaffected,. With other functions the system appears to function normally but discards the changes, - Training Mode is entered using special Username/password logins; Training Mode is exited by logging out in the usual manner.	<i>Direct Students to turn to Section 1.5 Training Mode</i> <i>Show Slide #5 Training Mode Example</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 1.5 SEA-02855 RFCS Agency Website Operations – Presentation

2.2 Login and Logout

Topic	Key Learning Points	Actions	Reference
7.	Learning outcome: Demonstrate the ability to navigate the Agency website		
8.	Demonstrate how to log on to the Agency website: Remind trainees to use only the provided Training Mode Username and password, not their real Username/password should they already have one assigned. When the ORCA Agency Website is activated, the ORCA Agency Site Login window is displayed and the user must take the following steps: - Enter your Agency username in the Username box. - Enter your password in the Password box. - Click the Login button.	Direct Students to turn to Section 2.1 Logging On Show Slide # 6 Logging In and #7 Welcome to ORCA page	SEA-00365 RFCS Agency Website Operations Manual, Section 2.1
9.	Explain what occurs if there is a login error: If the Username and/or Password entered do not correspond or are invalid, an error message is displayed. There is a maximum of three unsuccessful login attempts, after which the user account is locked. Contact your supervisor to unlock your user account Incorrect username entries do not count toward failed attempts	Direct Students to turn to Section 2.1.1 Login Error Show Slide #8 Login Error	SEA-00365 RFCS Agency Website Operations Manual, Section 2.1.1
10.	Demonstrate how to change a password: - Click the Update password link. - Enter existing password. - Enter new password twice (6-15 alphanumeric characters). - Click the Update password button. - Click Continue. Note: Asterisk (*) denotes a required field throughout the website	Direct Students to turn to Section 2.2 Changing Password Show Slide #9 Changing Password	SEA-00365 RFCS Agency Website Operations Manual, Section 2.2
11.	Demonstrate how to log out of the Agency website: To log out of the Agency website, click the Logout button. Clicking this option aborts any activity or function in progress The ORCA Agency Site Login window is displayed,	Direct Students to turn to Section 2.3 Logging Out Show Slide #10 Logging Out	SEA-00365 RFCS Agency Website Operations Manual, Section 2.3

Topic	Key Learning Points	Actions	Reference
	and an authorized user must log in before any further activity can be carried out		
12.	Practice Exercises 1 should be performed here. a) Log in to the Agency Website b) Change user password c) Log out of the Agency Website Note: Make sure students are using Training logins. Provide the new user password so that at the end of the class, all training logins still have the same password.		SEA-02704 Agency Website - Student Workbook Section 2, Exercises 1

2.3 Card Orders and Inventory Management

Topic	Key Learning Points	Actions	Reference
13.	Learning outcomes: • Demonstrate how to carry out card inventory functions • Demonstrate how to carry out Supervisor functions		
14.	Provide an overview of card orders and inventory management: The card order and inventory management functions are intended for Agency staff functions such as card ordering, sending cards, and updating card inventory details. (Table 1) Explain which default Fulfilling Parties will fill a card order based upon the Ordering Party. (Table 2) Explain that Special Handling Instructions appear on the packing slip and that Notes log entries appear above the field, are non-editable and are visible to the Mail Center	Direct Students to turn to Section 3 Card Orders and Inventory Management	SEA-00365 RFCS Agency Website Operations Manual, Section 3
15.	Explain the various card order statuses: Order Pending – ordered not approved Ordered Confirmed – approved by Supervisor In Progress – being fulfilled by Fulfilling Agency Shipped – card order shipped Accepted – card order accepted by Ordering Agency Rejected – card order rejected by Ordering Agency	Direct Students to Table 1: Card Order Status Definitions	SEA-00365 RFCS Agency Website Operations Manual, Section 3, Table 1.
16.	Demonstrate the process for the creation of cardstock orders: 1. On the Card orders & inventory management tab, select New card order or click the Create a	Direct Students to turn to Section 3.1.1 Placing a Cardstock Order	SEA-00365 RFCS Agency Website Operations Manual,

Topic	Key Learning Points	Actions	Reference
	new order button. 2. Enter information for new card order. • To be fulfilled by field defaults, but can be changed. • One card type per order. • Selecting the Preloaded disposable card type changes the To be fulfilled by field to Mail Center and displays the Disposable Amount dropdown. • If the address and contact information is automatically provided, it can be overwritten. 3. When you are done entering the order, click the Send button.	<i>Show Slide #11 Card Order and Inventory Management and #12, 13 Placing a Cardstock Order</i> <i>Show Slide #14 Preloaded Disposable Type</i> <i>Show Slide #15 New Cardstock Order - Complete</i>	Section 3.1.1
17.	<i>Practice Exercises 2 Part 1 should be performed here.</i> a) Order new cardstock b) Order Operator Cards c) Order New Preloaded Disposable Cardstock		SEA-02704 Agency Website - Student Workbook Section 2, Exercise 2 a, b & c
18.	<i>Demonstrate how a supervisor can approve or cancel card orders:</i> Supervisors are required to confirm or cancel card orders before they go to fulfillment. 1. On the Card orders & inventory management tab, select Approve card orders. 2. Choose one or more orders by selecting the checkbox in the Order number column. • To approve, click the Approve orders button. A confirmation message displays. • To cancel, click the Cancel orders button. A confirmation message displays.	<i>Direct Students to turn to Section 3.1.2 Approving Cardstock Orders (Supervisors)</i> <i>Show Slide #16 Approving Cardstock Orders (Supervisors)</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 3.1.2

Topic	Key Learning Points	Actions	Reference
19.	<i>Demonstrate the process to accept cards received:</i> Authorized Agency users can confirm that cards have been received and accepted. Only card orders with a status of Shipped can be accepted. This function is also used to accept cards received that have been rejected and returned to a fulfilling party. 1. Click the Card orders & inventory management tab. 2. Select the appropriate Order number checkbox and click the Accept cards received button. 3. Click the Yes button on the confirmation box. The Order status is updated to Accepted.	<i>Direct Students to turn to Section 3.1.3 Accepting Received Cardstock Orders</i> <i>Show Slide #17 Accepting Received Cards</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 3.1.3
20.	<i>Demonstrate the process to cancel a card order:</i> Only card orders with the status of Ordered Pending or Ordered Confirmed can be cancelled. 1. Click the Card orders & inventory management tab. 2. Select the appropriate Order number checkbox and click the Cancel order/s button. 3. Click the Yes button. Note: Cancelled Order can be viewed on the Fulfilled Orders List after cancellation.	<i>Direct Students to turn to Section 3.1.4 Canceling Cardstock Orders</i> <i>Show Slide #18 Canceling Card Orders</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 3.1.4
21.	<i>Demonstrate how to modify card order details:</i> Authorized Agency users can view and update existing card orders originated by the current Agency. 1. On the Card orders & inventory management tab, select Fulfilled orders. 2. Click the Order number of the order you want to modify. 3. Modify fields as required. 4. Click the Save Changes button. Note: Modification can happen in both the Cards Sending and Cards Ordering Fulfilled Orders List.	<i>Direct Students to turn to Section 3.1.5 Modifying Card Order Details</i> <i>Show Slide #19 Modifying Card Order Details</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 3.1.5
22.	<i>Demonstrate how a supervisor can reject card orders:</i> This function is used to reject an entire card order which will be returned to the fulfilling party. Status must be Shipped. 1. Click the Card orders & inventory management tab. 2. Select the appropriate Order Number checkbox	<i>Direct Students to turn to Section 3.1.6 Rejecting Received Cards (Supervisors)</i> <i>Show Slide #20 Rejecting Received Cards</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 3.1.6

Topic	Key Learning Points	Actions	Reference
	and click the Reject cards received button. 3. Click the Yes button on the confirmation box. The Order status is updated to Rejected.	<i>(Supervisors)</i>	
23.	<i>Demonstrate the how to change the status of fulfilled cardstock orders to Shipped:</i> 1. On the Card orders & inventory management tab, select Card sending . 2. Click a link in the Order number column. 3. Set the Projected Ship Date , 4. Change the Order status to Shipped . 5. Enter the Shipped quantity and Card serial number range . 6. To save the changes, click the Save changes button.	<i>Direct Students to turn to Section 3.2 Fulfilling Cardstock Orders</i> <i>Show Slide #21 Card Sending and #22 Fulfilling Cardstock Orders</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 3.2
24.	<i>Demonstrate how to view card inventory:</i> Card inventory details are updated automatically by actions such as receipt of card orders or card sales. 1. On the Card orders & inventory management tab, select View inventory . 2. Enter serial number info or other search criteria not both. 3. Click the Search button.	<i>Direct Students to turn to Section 3.3 Viewing Cardstock Inventory Status</i> <i>Show Slide #23 Viewing Card Inventory Status and #24 Standard Transit Type Search Results</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 3.3
25.	<i>Demonstrate how to move card inventory to an available sub-location:</i> 1. On the Card orders & inventory management tab, select View inventory 2. Search for inventory to move. 3. Choose sub-location from Card Location dropdown 4. Click Save Changes button. Confirm request displays. 5. Click Yes Confirmation of update displays.	<i>Show Slides#24 Standard Transit Type Search Results,</i> <i>Show Slides#25 & 26 Confirm Requests and Confirmation message</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 3.3

Topic	Key Learning Points	Actions	Reference
26.	Demonstrate the process for dealing with defective cards: Only Authorized Supervisors can return cards because they are defective or damaged. - A Defective card is a smart card that has stopped working with no appearance of physical damage. An issued card to be considered defective only if the card cannot be read, it shows no visible signs of misuse, and it was issued for use within the last four years. Unissued cards will be deemed defective if they cannot be written to or have substandard primary graphics - A Damaged card is a smart card that has stopped working as a result of being physically damaged, beyond normal wear and tear (within the last four years), and was caused by: - Force Majeure event; or - Accidental, deliberate or negligent act of a person other than ERG, its Subcontractors of any tier and their respective officers, directors, employees, agents and representatives.	Direct Students to turn to Section 3.4 Handling Defective and Damaged Cards	SEA-00365 RFCS Agency Website Operations Manual, Section #3.4
27.	Practice Exercises 2 Part 2 should be performed here. d) Modify a card order placed in prior exercise e) Cancel a card order placed in prior exercise f) Accept a shipped card order g) View card inventory for both a single card and a range of cards Note: exercise g should be done in Production mode. Explain the differences between Training Mode and Production again. Make sure the students understand Production is the live system.		SEA-02704 Agency Website - Student Workbook Section 2, Exercises 2 d through 2 g

2.4 Customer Support

Topic	Key Learning Points	Actions	Reference
28.	Learning outcome: Understand how to carry out various customer support service functions Demonstrate how to carry out Supervisor functions		
29.	Demonstrate how a supervisor can block or unblock a single card:	Direct Students to turn to Section 4.1 Blocking or	SEA-00365 RFCS Agency Website

Topic	Key Learning Points	Actions	Reference
	An authorized Supervisor can block or unblock a card. - On the Customer support & card services tab, select Block/Unblock cards and products. - Enter a CSN in the Single card serial number box or a range of card serial numbers. - Block or unblock as needed. - To block or unblock the entire card or range of cards, select the Blocked or Unblocked radio button next to Card, and then select the Blocking Reason or enter an Unblocking Reason. - To block or unblock one or more products on the card or range of cards, select the checkbox of the product you want to change, select the Blocked or Unblocked radio button next to it, and then select the Blocking Reason or enter an Unblocking Reason. NOTE: For Business Account cards with a purse blocked as inaccessible, the blocking reason will be displayed but purse blocks will not be allowed. - Click the Update button - In the confirmation box, click Yes to confirm..	Unblocking Cards (Supervisors) Show Slide #27 Blocking or Unblocking Cards (Supervisor) Search Page and #28 Blocking or Unblocking Cards (Supervisor) Block/Unblock page	Operations Manual, Section 4.1
30.	Demonstrate how to search for work orders: - Click the Customer support & card services tab. - Enter all of the known details of the work order you want to view. - Click the Search button. - Click a work order Number, if multiple results return. - To exit this page, click the Back to work orders button.	Direct Students to turn to Section 4.2 Searching for Work Orders Show Slide #29 Searching for Work Orders, # 30 Search Results and #31 Work Order Details Page	SEA-00365 RFCS Agency Website Operations Manual, Section 4.2
31.	Demonstrate how to view a customer's transaction history: - On the Customer support & card services tab, select Transaction history. - Enter the cardholder's name (or partial name) or a CSN and click the Search button. - Click the name of an individual cardholder. - To exit this page, click the Back button.	Direct Students to turn to Section 4.3 Viewing Transaction History Show Slide #32 Viewing Transaction History, #33 Multiple Results, #34 Single Results, #35 Business Account User & #36	SEA-00365 RFCS Agency Website Operations Manual, Section 4.3

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Topic	Key Learning Points	Actions	Reference
		<i>Transactions Listing</i>	
32.	Demonstrate how to upload ACCESS eligibility files: - On the Customer support & card services tab, select Upload ACCESS file. - Find a file to upload by clicking the Browse button and selecting a file. Click Open. - To upload the selected file, click the Upload file button. - Click the Yes button to confirm. Note: The file will appear to upload but will not be saved in Training Mode.	<i>Direct Students to turn to Section 4.4 Uploading ACCESS Eligibility File</i> <i>Show Slide #37 Uploading ACCESS Eligibility File</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 4.4
33.	Practice Exercises 3 should be performed here. - Update card inventory by changing card status to Damaged (Supervisors Only) (OJT) - View the details of an existing work order (Training Mode) - View an example transaction history (Production) - Block specific products on a single ORCA card (Supervisors Only) (Training Mode) - Block a range of ORCA cards (Supervisors Only) (Training Mode) - Update the ACCESS eligibility file (Authorized KCM users Only) (Training Mode) Each exercise indicates whether it should be performed in Training Mode, Production or OJT. For OJT, explain the process. Remind the students of the differences.		SEA-02704 Agency Website - Student Workbook Section 2, Exercises 3

2.5 Finance

Topic	Key Learning Points	Actions	Reference
34.	Demonstrate how to view NSF history: - On the Customer support & card services tab, select Non-sufficient funds. - Enter the cardholder's name (or partial name) or a CSN and click the Search button. - Click the name of an individual cardholder. - Select an individual event to display further details.	<i>Direct Students to turn to Section 5.1 Viewing Non-Sufficient Funds History</i> <i>Show Slide #38 Viewing Non-Sufficient Funds History</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 5.1
35.	Demonstrate how a supervisor can add NSF	<i>Direct Students to turn to Section 5.2</i>	SEA-00365 RFCS Agency

Topic	Key Learning Points	Actions	Reference
	events: - On the Customer support & card services tab, select Non-sufficient funds. - Enter the cardholder's name (or partial name) or a CSN and click the Search button. - Click the name of an individual cardholder. - Click the Add new button. - Enter the details of the NSF event. Required fields are indicated with an asterisk (*). - Click the Save event button.	Adding NSF Event (Supervisors) Show Slide #39 Adding NSF Event (Supervisors)	Website Operations Manual, Section 5.2
36.	Demonstrate how a supervisor can update an NSF history: - On the Customer support & card services tab, select Non-sufficient funds. - Enter the cardholder's name (or partial name) or a CSN and click the Search button. - Click the name of an individual cardholder. - Select the required entry by clicking the Fare Card link. - Change the details as needed. - Click the Save event button.	Direct Students to turn to Section 5.3 Updating NSF Event (Supervisors) Show Slide #40 Updating NSF History (Supervisors)	SEA-00365 RFCS Agency Website Operations Manual, Section 5.3
37.	Demonstrate how a supervisor can add a bad check list entry: - Click the Check & PO lists tab. - Enter the Branch routing number and the Checking account number. - Click the Add entry button. Note: The Bad Check List is transmitted in the CD and the CST's will not accept a check for payment if the routing and account numbers match any Bad Check List entry.	Direct Students to turn to Section 5.4 Adding a Bad Check List Entry (Supervisors) Show Slide #41 Adding a Bad Check List Entry (Supervisors)	SEA-00365 RFCS Agency Website Operations Manual, Section 5.4
38.	Demonstrate how a supervisor can remove a bad check list entry: - On the Check & PO lists tab, select Remove bad check entry. - Enter the Branch routing number and the Checking account number. - Click the Remove entry button. - Click the OK button.	Direct Students to turn to Section 5.5 Deleting a Bad Check List Entry (Supervisors) Show Slide #42 Deleting a Bad Check List Entry (Supervisors)	SEA-00365 RFCS Agency Website Operations Manual, Section 5.5

Topic	Key Learning Points	Actions	Reference
39.	<i>Demonstrate how a supervisor can add a corporate check/PO list entry:</i> - On the Check & PO lists tab, select Add corp. check/PO entry. - Enter the company's details. - Click the Add entry button.	<i>Direct Students to turn to Section 5.6 Adding Corporate Check/PO List Entry (Supervisors)</i> <i>Show Slide #43 Adding Corporate Check/PO List Entry (Supervisors)</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 5.6
40.	<i>Demonstrate how a supervisor can update/delete a corporate check/PO list entry:</i> An Agency can update or delete only those Corporate/PO check list entries that were originally added by that Agency. - On the Check & PO lists tab, select Update/Delete corp. check/PO entry. - To update or delete an entry in the Corporate check list, click the Company name link. - Change the details as needed. - To modify the entry, click the Save changes button. A confirmation message displays. - To delete the entry, click the Delete entry button. A confirmation message displays. Click the Yes button.	<i>Direct Students to turn to Section 5.7 Updating or Deleting a Corporate Check/PO List Entry (Supervisors)</i> <i>Show Slide #44 Updating or Deleting a Corporate Check/PO List Entry (Supervisors)</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 5.7
41.	<i>Practice Exercises 4 should be performed here.</i> - View the NSF events for a customer (Authorized users Only) (Production) - Add a new NSF event for a customer (Supervisors Only) (Training Mode) - Update history information in an NSF event record (Supervisors Only) (OJT) - Add a bad check entry (Supervisors Only) (Training Mode) - Delete a bad check entry from previous exercise (Supervisors Only) (Training Mode) - Update a corporate check/PO entry (Supervisors Only) (OJT) Each exercise indicates whether it should be performed in Training Mode, Production or OJT For OJT, explain the process. Remind the students of the differences.		SEA-02704 Agency Website - Student Workbook Section 2, Exercises 4

2.6 Vanpools

Topic	Key Learning Points	Actions	Reference
42.	Demonstrate the process to set up a new vanpool: - On the Customer support & card services tab, select Manage vanpools. - Click the Add new vanpool button. - Enter the new vanpool's details. - Fill in the fare table if a vanpool fare code has not been provided. - If an existing fare code is to be provided, click Apply existing fare. Click the > button next to the fare code to add. The new fare code displays. - Once you have entered all of the vanpool details, click the Save changes button.	Direct Students to turn to Section 6.1 Adding New Vanpool Show Slide #45 Adding New Vanpool	SEA-00365 RFCS Agency Website Operations Manual, Section 6.1
43.	Demonstrate how vanpool details can be updated: - On the Customer support & card services tab, select Manage vanpools. - Select a vanpool from the list of valid vanpool IDs. - Update any field displayed except Agency Vanpool ID, which cannot be updated. - If PFTPs are used, set the PFTP enabled indicator to Yes. - When you are done making changes, click the Save changes button.	Direct Students to turn to Section 6.2 Viewing and Updating Vanpool Details Show Slide #46 and # 47 Viewing and Updating Vanpool Details	SEA-00365 RFCS Agency Website Operations Manual, Section 6.2
44.	Demonstrate how vanpool fare codes can be created and updated: - On the Customer support & card services tab, select Manage vanpools. - Click the Create and maintain fare codes button. - Modify an existing fare code or click the Add a new fare code button. - Click the Save fare codes button to save the new or modified entries.	Direct Students to turn to Section 6.3 Creating and Modifying Vanpool Fare Codes Show Slide #48 Creating and Modifying Vanpool Fare Codes	SEA-00365 RFCS Agency Website Operations Manual, Section 6.3
45.	Practice Exercises 5 should be performed here. - Add a new vanpool ID (Authorized users Only) (Training Mode) - View and update an existing vanpool ID (Authorized users Only) (OJT) Each exercise indicates whether it should be performed in Training Mode, Production or OJT. For OJT, explain the process. Remind the students		SEA-02704 Agency Website - Student Workbook Section 2, Exercises 5

Topic	Key Learning Points	Actions	Reference
	<i>of the differences.</i>		

2.7 WSF Rebates

Topic	Key Learning Points	Actions	Reference
46.	Demonstrate how to upload rebate files: - On the Customer support & card services tab, select Manage rebates. - Click the Upload new file button. - Find a file to upload by clicking the Browse button and selecting a file. Click Open. - To upload the selected file, click the Upload file button. - To add comments to the file, fill in the text box and click the Add comments button. - To upload another rebate file, repeat steps 3 and 4. <u>NOTE: A Business Account card with a Blocked-inaccessible purse will not have any rebate value applied to the card.</u> - When you are done uploading files, click the Back to manage rebates button. Note: The file will appear to upload but will not be saved in Training Mode.	Direct Students to turn to Section 7.1 Uploading Rebate Files Show Slide #49 Uploading Rebate Files and #50 File Uploaded Page	SEA-00365 RFCS Agency Website Operations Manual, Section 7.1
47.	Demonstrate how to view rebate history: - On the Customer support & card services tab, select Manage rebates. - Click the link in the Request ID column to select the individual rebate details to display. - Click the Back to rebate history button to return to the View rebate history page. Note: In Training Mode, the Rebate History is a view of the Production Rebate History information..	Direct Students to turn to Section 7.2 Viewing Rebate History Show Slide #51 Viewing Rebate History	SEA-00365 RFCS Agency Website Operations Manual, Section 7.2
48.	Demonstrate how a supervisor can authorize or cancel rebates: - On the Customer support & card services tab, select Manage rebates. - Choose one or more files by selecting the checkbox in the ID column. - To authorize the selected files, click the Authorize rebates button. A confirmation message appears.	Direct Students to turn to Section 7.3 Authorizing or Canceling Rebates (Supervisors) Show Slide #52 Authorizing or Canceling Rebates	SEA-00365 RFCS Agency Website Operations Manual, Section 7.3

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Topic	Key Learning Points	Actions	Reference
	To authorize the selected files, click the Cancel rebates button. A confirmation message appears.	<i>(Supervisors)</i>	
49.	<i>Practice Exercises 6 should be performed here.</i> a) Upload a rebate file (Authorized WSF users Only) (Training Mode) b) Authorize a rebate (WSF Supervisors Only) (OJT) <i>Each exercise indicates whether it should be performed in Training Mode, Production or OJT. For OJT, explain the process. Remind the students of the differences.</i>		SEA-02704 Agency Website - Student Workbook Section 2, Exercises 6

2.8 Knowledge Base

Topic	Key Learning Points	Actions	Reference
50.	Learning outcome: Describe procedures for updating the Knowledge Base		
51.	<i>Demonstrate how to perform a Knowledge Base query:</i> - To open the Knowledge Base, click the Search link at the bottom of the page - To search by item headings, select a topic by clicking a tab at the top of the page, then select a subtopic by clicking an item in the menu on the left side of the page. - To search by keywords or phrases, enter the keywords in the Search box and click the Search button. For more options, click the Advanced search link. - A feedback message is displayed. If you answer this optional question, click Submit and your answer is recorded for Knowledge Base metrics. - To exit, click the Close Knowledge base button.	<i>Direct Students to turn to Section 8.1 Using the Knowledge Base</i> <i>Show Slide #53 Using the Knowledge Base and #54 Knowledge Base Feedback Message</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 8.1
52.	<i>Describe the role of the Knowledge Administrator:</i> - The Knowledge Base Administrator is responsible for managing the content of the Knowledge Base. Only a user with this access role can add, update, or delete items. - When the Knowledge Base Administrator clicks Show Response Log, the number of successful and unsuccessful queries is displayed for each Knowledge Base item. Information that users have	<i>Direct Students to turn to Section 8.2 Administering the Knowledge Base</i> <i>Show Slide #55 Administering the Knowledge Base and #56 Knowledge Base Feedback</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 8.2

Topic	Key Learning Points	Actions	Reference
	entered in the Reason field is displayed.	<i>Statistics</i>	
53.	<i>Demonstrate how a Knowledge Administrator can add or modify a Knowledge Base item:</i> - On the Customer support & card services tab, select Knowledge base. - Click the Add new knowledge base item button. - Select the High level topics and Subtopics for this item. Subtopic headings can be added, but should be carefully considered to keep Knowledge Base manageable. - Click the Save item button to save the changes.	<i>Direct Students to turn to Section 8.2.1 Adding or Modifying a Knowledge Base Item</i> <i>Show Slide #57 Adding or Modifying a Knowledge Base Item and # 58 Adding or Modifying a Knowledge Base Item –page 2</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 8.2.1
54.	<i>Demonstrate how a Knowledge Administrator can add or remove a Knowledge Base subtopic:</i> - On the Customer support & card services tab, select Knowledge base. - Click the Maintain subtopics button. Note: Adding, removing, or updating subtopics affects all Knowledge Base items under that subtopic. - Change, delete, or add subtopic headings as needed. - To add a new subtopic, enter the heading and click the Add another subtopic button. - To delete an entire subtopic, click the Delete button next to the subtopic name. A warning and confirmation window displays. Click the Yes button. - Click the Save item button to save the changes.	<i>Direct Students to turn to Section 8.2.2 Adding or Deleting a Knowledge Base Subtopic</i> <i>Show Slide #59 Adding or Removing a Knowledge Base Subtopic</i>	SEA-00365 RFCS Agency Website Operations Manual, Section 8.2.2
55.	<i>Practice Exercises 7 should be performed here.</i> - Search the Knowledge Base (Production) - Add and remove a Knowledge Base item (Authorized user Only) (OJT) <i>Each exercise indicates whether it should be performed in Training Mode, Production or OJT. For OJT, explain the process. Remind the students of the differences</i>		SEA-02704 Agency Website - Student Workbook Section 2, Exercises 7

2.9 Reports

Topic	Key Learning Points	Actions	Reference
56.	Authorized users can access standard reports: - Click on Reports link. - Enter username & password. - Select from one of the standard reports. - Expired Vouchers - Business Card Account Transaction History - Business Card Status - Business Linked Ridership Summary - Business Unlinked Ridership Summary - Business Vanpool Subsidy Status - Business Vanpool Usage - Unredeemed Products More detail can be obtained from taking the Reports and/or Ad Hoc Reports class(es).	Direct Students to turn to Section 9 Reports Show Slide #64	SEA-00365 RFCS Agency Website Operations Manual, Section 9

2.10 Conclusion

2.10.1 Objective Review

Topic	Key Learning Points	Actions	Reference
57.	Summarize the learning objectives, which were listed at the beginning of the training module, and ensure that each of them has been addressed during the module: - Demonstrate the ability to navigate the Agency website - Demonstrate how to carry out various customer support service functions - Demonstrate how to carry out card inventory functions - Demonstrate how to carry out Supervisor functions - Describe procedures for updating the Knowledge Base		

2.10.2 Practical Hands-On Session/Trainee Assessment

Topic	Key Learning Points	Actions	Reference
58.	Ensure that each participant carries out following: - Change your user password - Place a new card order - Search for a work order and view the details - Find an Order that has been Shipped and Accept it - View a customer's NSF history (Authorized users Only) - View a Transaction History on a card - View and update an existing vanpool ID (Authorized users of applicable Agencies Only) - View a rebate history (Authorized WSF users Only) - Search the Knowledge Base	Direct Students to turn to Section 3 of the Student Workbook - Student Assessment Exercise Observe each student as he or she completes the exercise.	SEA-02704 Agency Website - Student Workbook Section 3, Student Assessment Exercise <i>Note: Trainer version with answers in Appendix A of this document.</i>

2.10.3 Final Question and Answer Session

Topic	Key Learning Points	Actions	Reference
59.	Give the participants an opportunity to ask any final questions before completing this module of the training course. In the event that a relevant question cannot be satisfactorily answered, the instructor is to obtain this information at the earliest opportunity. The details of the person asking the questions, or an agreed contact person, are to be taken, and the required information is to be forwarded as soon as practicable.	Answer questions as needed. Take the relevant contact details for forwarding the answers to any unanswered questions.	

2.10.4 Module Evaluation

Topic	Key Learning Points	Actions	Reference
60.	Ensure that there is a copy of the Module Evaluation Form for each participant to complete. Note: Only one Module Evaluation should be completed by each participant. Explain the requirement to have the participants provide an evaluation of the training module they have just attended.	Direct Students to turn to Section 4 of the Student Workbook Module Evaluation Form Ask each of the participants to complete the Module Evaluation	SEA-02704 Agency Website - Student Workbook Section 4, Module Evaluation Form

Topic	Key Learning Points	Actions	Reference
	In the interest of quality assurance, each student will be asked to complete a Module Evaluation Form. This will provide valuable information of the content, pace, and delivery of the material being presented. It also provides feedback on whether the instructor is meeting the standards required by the contract. <i>The students are not required to enter their names on this document; however, they can do so if they want to.</i>	<i>Form</i>	

2.10.5 Module Completion

Topic	Key Learning Points	Actions	Reference
61.	<i>Bring the module to an end, thanking everyone for their attention.</i> <i>Ensure that each participant has had an evaluation form completed.</i> <i>Ensure you have collected all Module Evaluation Forms.</i>		

Appendix A Student Assessment Exercise Answers

Module Title RFCS Agency Website Operations **Module Number/Code** AGENCY-
WEB

Module Duration **From:** **To:**

Module Venue **Name of
Instructor/Facilitator**

Name of participant

Task	Expected Result
1. Change your user password.	1. Click the Update password link. 2. Enter existing password. 3. Enter new password twice (6-15 alphanumeric characters). 4. Click the Update password button. 5. Click Continue.
2. Place a new card order.	1. On the Card orders & inventory management tab, select New card order or click the Create a new order button. 2. Enter information for new card order. • To be fulfilled by field defaults, but can be changed. • One card type per order. • The Disposable Amount on a Disposable Card Type is available only if the To be fulfilled by field is Mail Center. • The address and contact information is automatically provided, but it can be overwritten. 3. When you are done entering the order, click the Send button.
3. Search for a work order and view the details.	1. Click the Customer support & card services tab. 2. Enter all of the known details of the work order you want to view. 3. Click the Search button. 4. Click a work order Number. 5. To exit this page, click the Back to work orders button.
3. Find an order that has been shipped and accept it	1. Click the Card Orders & Inventory Management tab 2. Check box next to Shipped status Order. 3. Click Accept Cards Received button.

Task	Expected Result
4. View a customer's NSF history. (Authorized users Only)	- On the Customer support & card services tab, select Non-sufficient funds. - Enter the cardholder's name (or partial name) or a CSN and click the Search button. - Click the name of an individual cardholder. - Select an individual event to display further details. [Section 2.5, Topic 34]
5. View and update an existing vanpool ID. (Authorized users of applicable Agencies only)	- On the Customer support & card services tab, select Manage vanpools. - Select a vanpool from the list of valid vanpool IDs. - Update any field displayed except Agency Vanpool ID, which cannot be updated. - If PFTPs are used, set the PFTP enabled indicator to Yes. - When you are done making changes, click the Save changes button.
6. View a rebate history. (Authorized WSF users Only)	- On the Customer support & card services tab, select Manage rebates. - Click the link in the Request ID column to select the individual rebate details to display. - Click the Back to rebate history button to return to the View rebate history page.
7. Search the Knowledge Base.	- To open the Knowledge Base, click the Search link at the bottom of the page - To search by item headings, select a topic by clicking a tab at the top of the page, then select a subtopic by clicking an item in the menu on the left side of the page. - To search by keywords or phrases, enter the keywords in the Search box and click the Search button. For more options, click the Advanced search link. - A feedback message is displayed. If you answer this optional question, click Submit and your answer is recorded for Knowledge Base metrics. - To exit, click the Close Knowledge base button.

Appendix B List of Tables

Table 1: Instructor Guide Conventions	3
Table 2: Module Details.....	5

Appendix C References

The following materials are to be used in conjunction with or are referenced by this document.

- [1] SEA-00365 Agency Website Operations Manual
- [2] SEA-02703 Agency Website – Instructor Guide

Appendix D Document History

Revision	Revision Date	Reason for Issue	Author
0.1	17 July 2006	Initial draft	Patrick McDonald
1.0	31 July 2006	Release to Customer	Patrick Branch
1.1	25 Aug 2006	Edit content	Yvonne Ricker
1.2	28 Aug 2006	Edit/format	Stephen Lynch
1.3	1 Dec 2006	Content Revision	Patrick McDonald
1.4	18 Dec 2006	Edit/format for resubmission	Stephen Lynch
1.5	13 June 2008	Updated for submission	Tricia Spicer Bekey
1.6	24 June 2008	Edit/format	Kayla Joy Sherwood
1.7	25 June 2008	Updated for submission	Tricia Spicer Bekey
1.8	27 June 2008	Review for Submission	Kayla Joy Sherwood
1.9	30 June 2008	Edit for submittal - Phase 2 Release2 Training materials [SEA300670]	Leigh Alexander
2.0	30 June 2008	Release to Customer - Phase 2 Release2 Training materials [SEA300670]	Rose Fallaw
2.1	25 July 2008	Format change per customer request	Michael Grey
2.2	15 Aug 2008	Updated for submission	Michael Grey
2.3	15 Aug 2008	Edit for submittal	Daniel Salter
2.4	18 Aug 2008	Final QA edit – formatting track changes removed	P. Hazard
2.5	18 Aug 2008	Review against Agency comments and ERG responses	Leigh Alexander
3.0	18 Aug 2008	Release to Customer	Rose Fallaw
3.1	3 Oct, 2008	Respond to Dry Run comments; edit for submittal	Michael Grey
3.2	3 Oct 2008	Edit for submittal [SEA300730 – ERG revises & resubmits]; all slide numbers incremented by one to reflect addition of continued Presentation History slide as slide #3.	Leigh Alexander
4.0	3 Oct 2008	Release to Customer [SEA300730 – ERG revises & resubmits]	Rose Fallaw
4.1	21 Oct 2008	Edited for Submittal	Michael Grey
5.0	23 Oct 2008	Release to Customer - Release 2 Trng - ERG ReSubmits	Rose Fallaw
5.1 5.2	10 Nov 2008	Update exercises to indicate Training Mode, Production or OJT.	Joan Bayer
6.0	12 Nov 2008	Release to Customer	Rose Fallaw
6.1	30 July 2009	Accepted tracked changes and comments that predate NAC SEA-05553 dated 16 July 2009	Joan Bayer
6.2	11 Jun 2010	Update document for RFI 262	Joan Bayer
7.0	11 Jun 2010	Release to Customer	Elaine Aulgur

Revision	Revision Date	Reason for Issue	Author
7.1	3 Nov 2010	Accept Changes and comments	Joan Bayer
7.2	3 Nov 2010	Update for RFI 448/CO45 (BA purse Block-inaccessible) Update to topics 29 and 46	Joan Bayer
8.0	17 Nov 2010	Release to Customer	Elaine Aulgur